



## Finding opportunity in Scotland's energy transition

Using interactive intelligence to identify future supply chain opportunities

For use

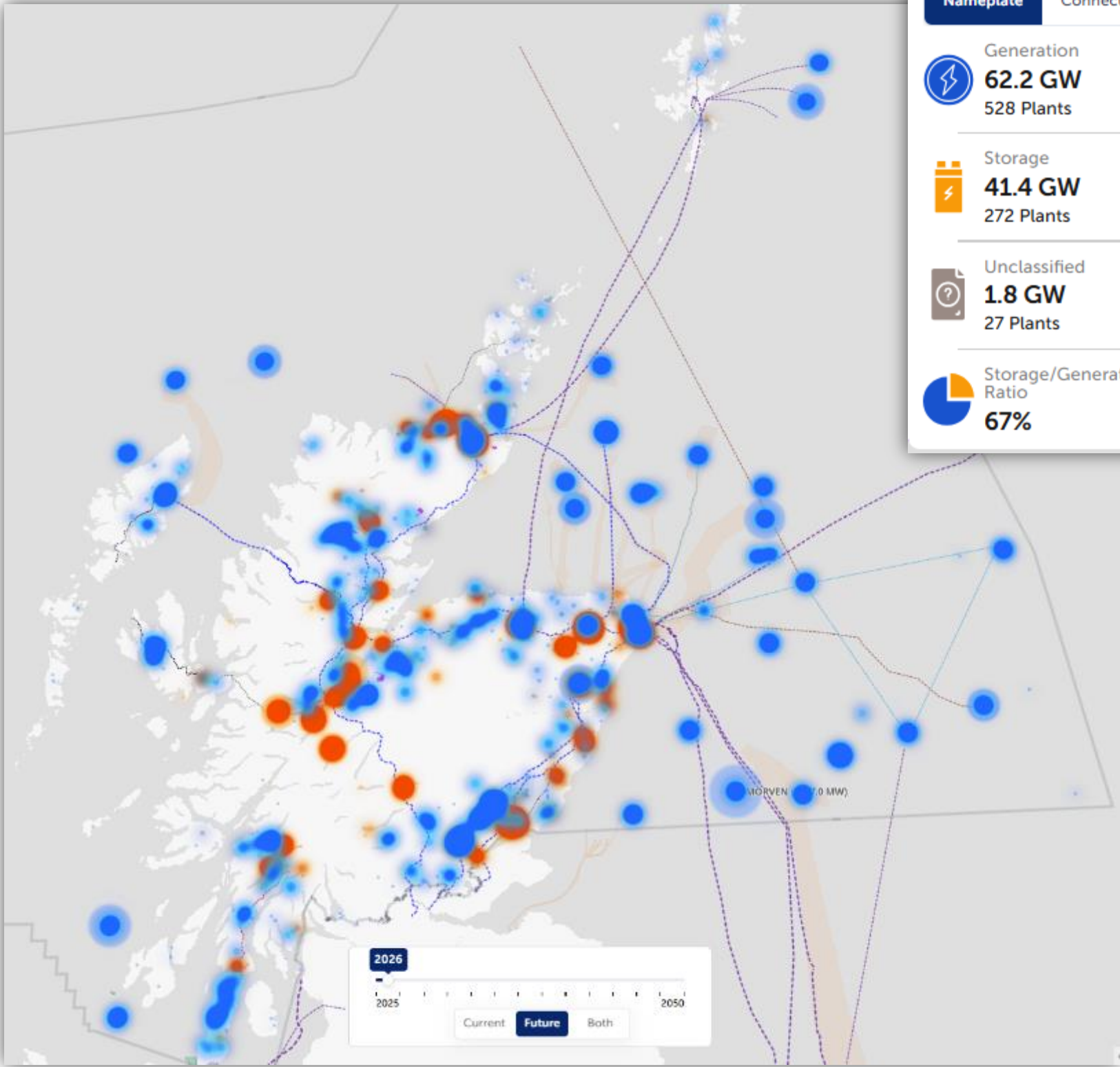
24 June 2026

# 1. Scotland's biggest industrial Opportunity?

A once-in-a-generation investment programme



History lesson [Image: SSEN Transmission]



Heat map of **future** power generation (blue)/storage (orange) capacity [Image: REACT]

# 2. Many have good data. Few have Clarity

We have wide access to good information

- Project databases
- News announcements
- Planning portals
- Industry reports

But – how to decide which opportunities deserve attention?

### Zenobe more than doubles synthetic inertia capability with second grid-forming BESS in Scotland

Second UK battery system to deliver grid stability services, including synthetic inertia, using grid-forming inverters comes online. It follows commissioning of Zenobe's Blackhillock project in northeast Scotland, the world's first battery storage system to provide full active and reactive power services.

By Matthew Lynas | Jan 23, 2026



The 302 MW/500 MWh Kilmacknock South BESS represents a step up in the volume of inertial UK batteries are providing to the grid.

Example project news story [ESS News]

### Current offshore wind projects

There are currently seven offshore windfarms operating in Scottish waters, with a total generating capacity of 1.9 GW.

Based on the [Scottish Government's Renewable Electricity Output Calculator](#), 1GW of capacity is enough to power more than 560,000 homes.

The interactive map below shows operating windfarms and those that are currently under construction or in development. Some are part of ScotWind and others were part of earlier leasing processes. Details of windfarms, including supply chain commitments for ScotWind projects, can be accessed by clicking them on the map.

The projects in development aim to start generating electricity by or before 2032.

Offshore wind project map [Crown Estate Scotland]

### Find Projects

Search by area

Power transmission project map [SSEN Transmission]

# 3. The questions supply chains need to answer

“For my own business activity –

- **Which areas** will grow fastest?”
- **Where & when** should we invest, recruit, develop capability?”
- **Which opportunities** should we prioritise right now?”



Substation civil works [Utility magazine]



Turbine logistics [MotorTransport]



Offshore staging/ loadout [Hywind Scotland]

# 4. How SSEN asked us to explore future scenarios

Innovation project 'REACT' – delivered by SSEN Transmission through SMEs

Decision-support tool to help network planners understand possible futures across zones:

- Planning risks & viability
- Local connection competition
- Likelihood of connection, cumulative area capacity



Use Cases & Features at end of Innovation Phase March 2026 [REACT]

# 5. Projects -> Opportunities -> Action

Different developments create different supply-chain value

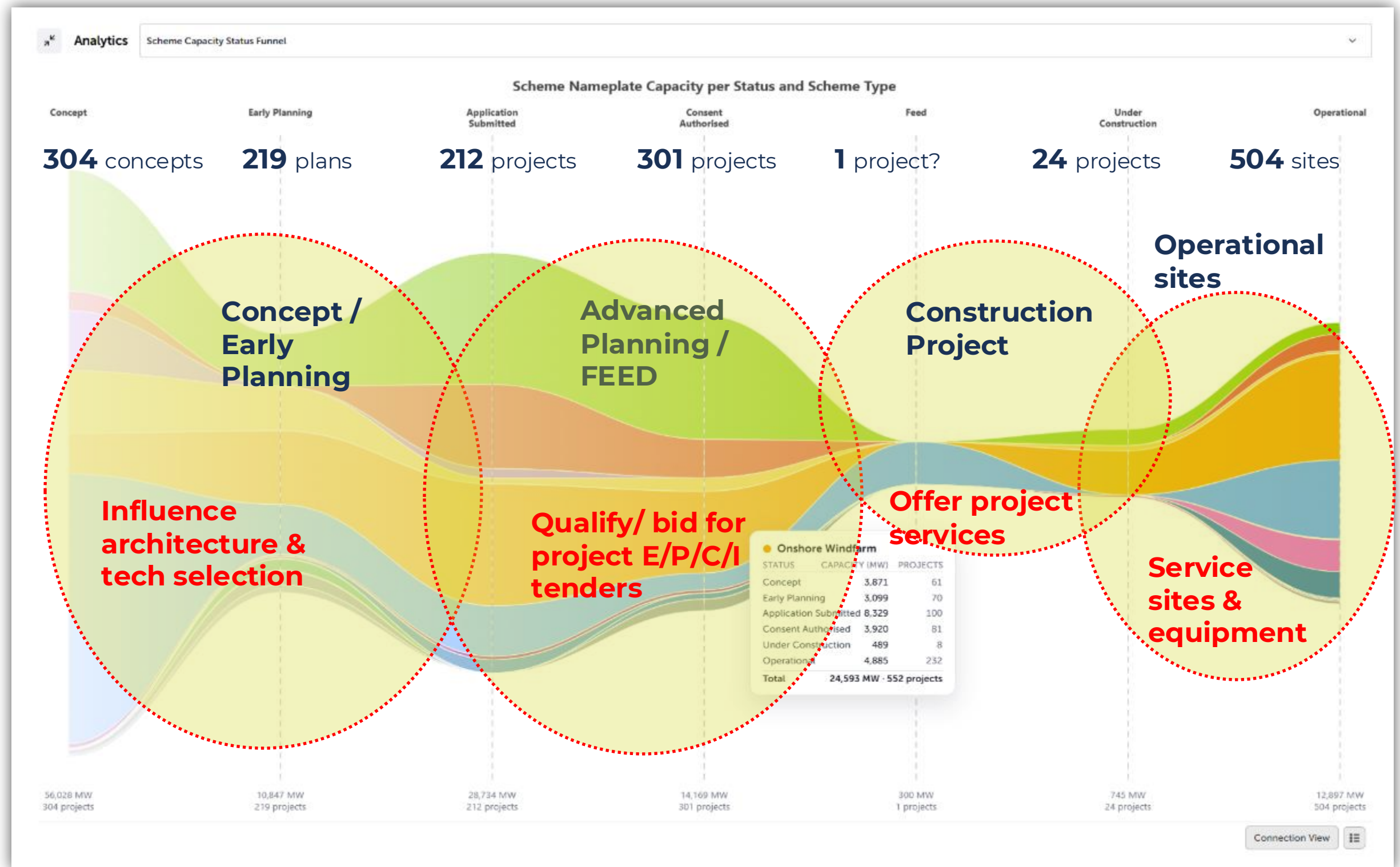
Projects

-> Opportunities

-> Actions to take

- **INVEST**
- **RECRUIT**
- **PARTNER**
- **BID**
- **EXPAND**

Rapidly evolving -> need frequent revalidation

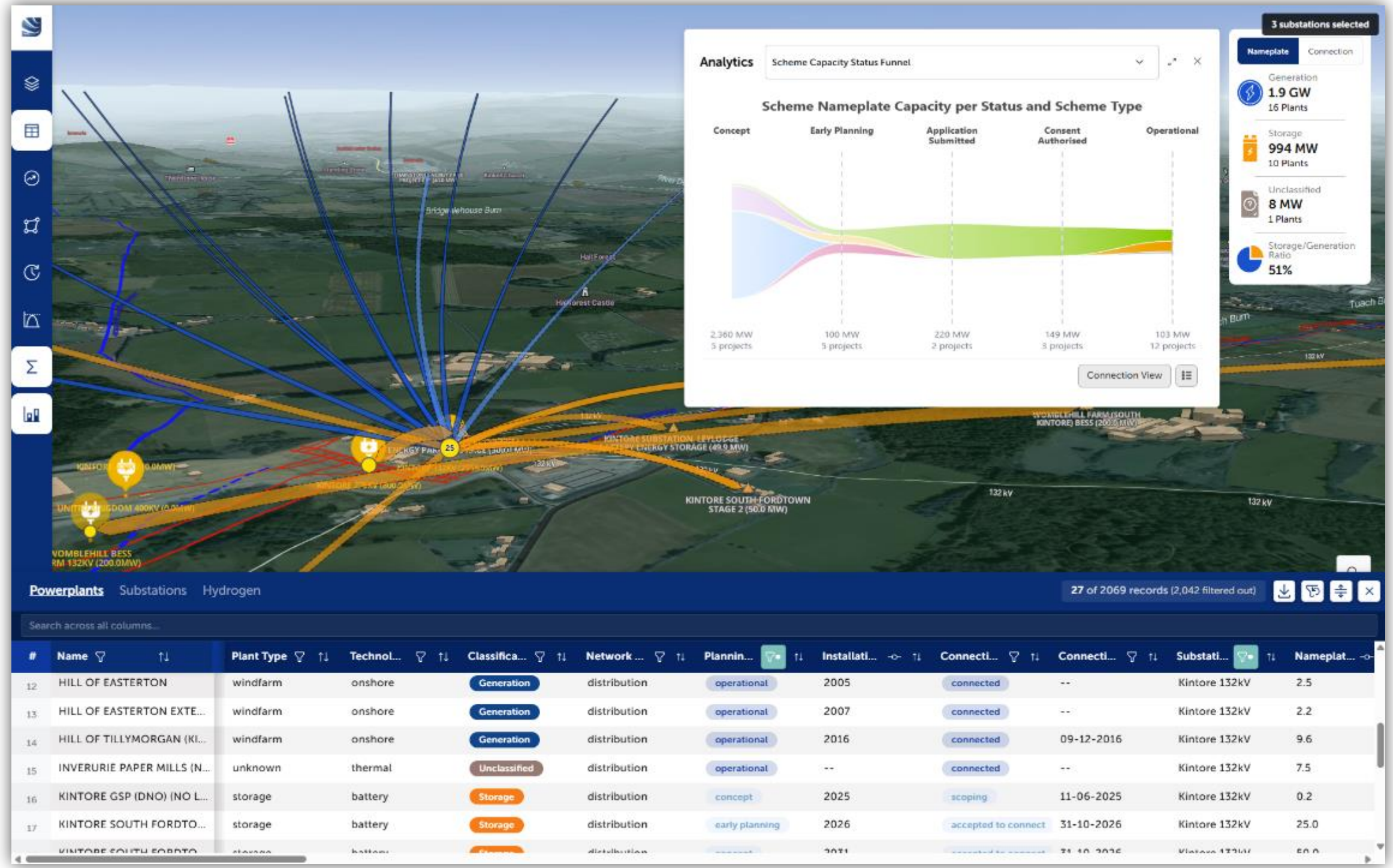


Supply chain opportunity types associated with the project development pipeline [REACT]

# 6. What Does Supply Chain Opportunity Look Like In Practice?

Example custom intel queries:

- **Schemes connecting into Kintore? ->**
- Projects within 30km of Peterhead?
- Aberdeenshire Transmission circuits & substations installed after 2035?
- Top 10 Developers of BESS >10MW?
- Project pipeline for any given Developer?
- Offshore Wind that's secured CfD, Connection AND planning consent?

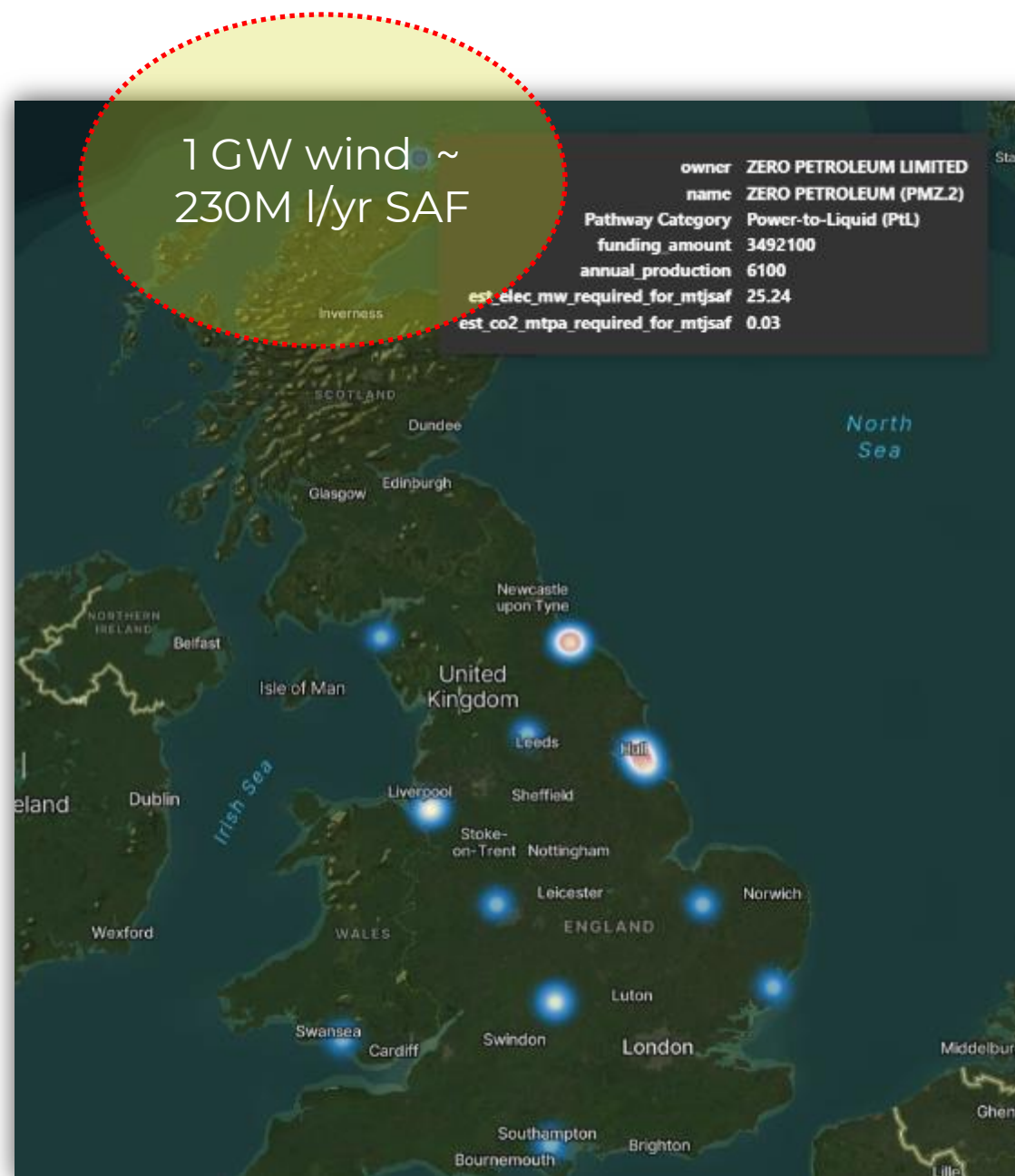


Example showing connectivity, types, relative capacities, details, summary of schemes connecting to Kintore [REACT]

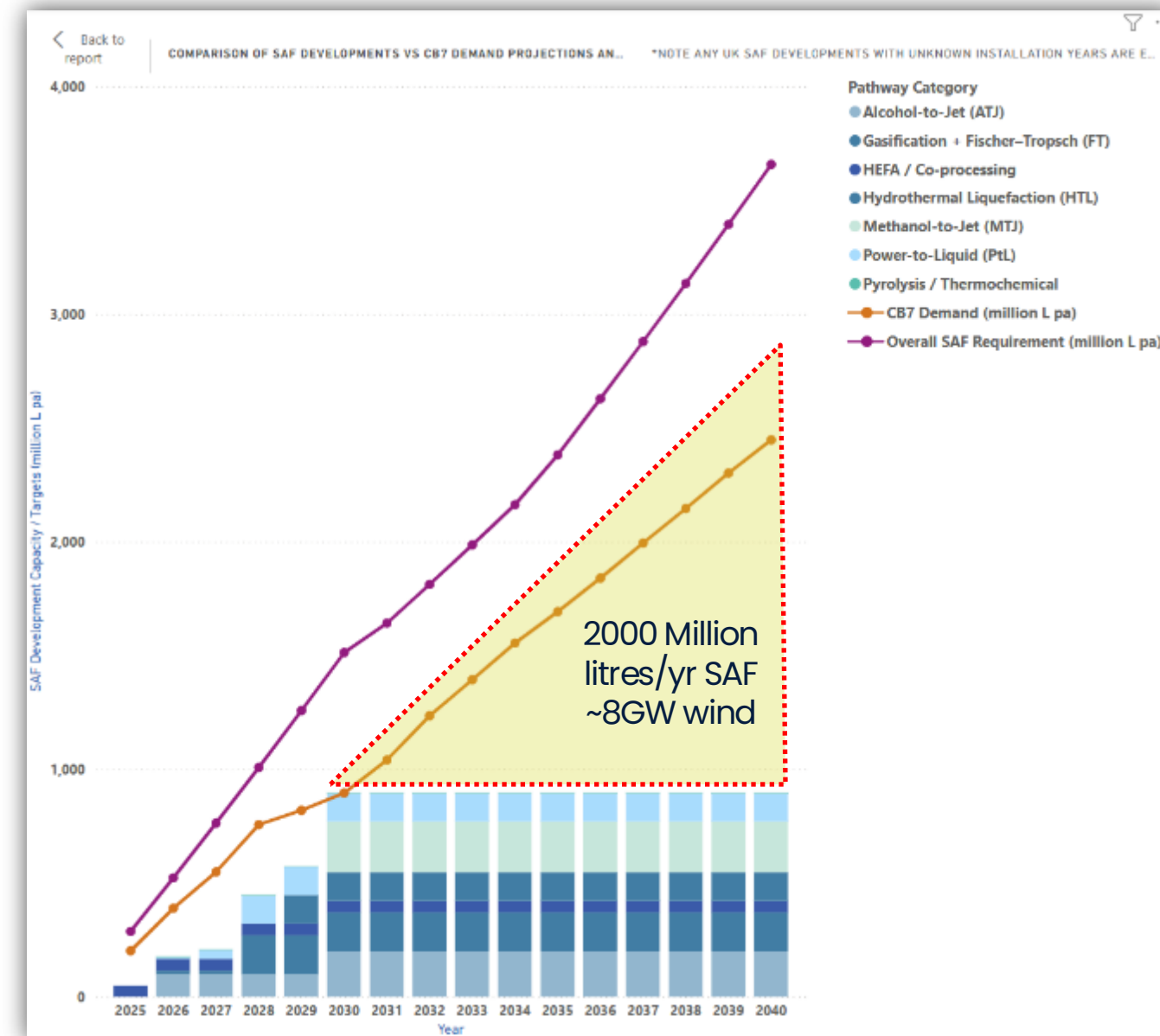
# 7. Opportunity doesn't always follow the same Path

An alternative opportunity for abundant wind: eFuels

- Some wind farms in far north express concern with grid connection access, cost
- 1 GW of Scottish wind could make ~ 230 Million l/yr of synthetic aviation fuel (SAF).
- N.Scotland could fill policy demand / clean fuel project initiation gap



Only 1 'Advanced Fuels Fund' dev in Scotland!



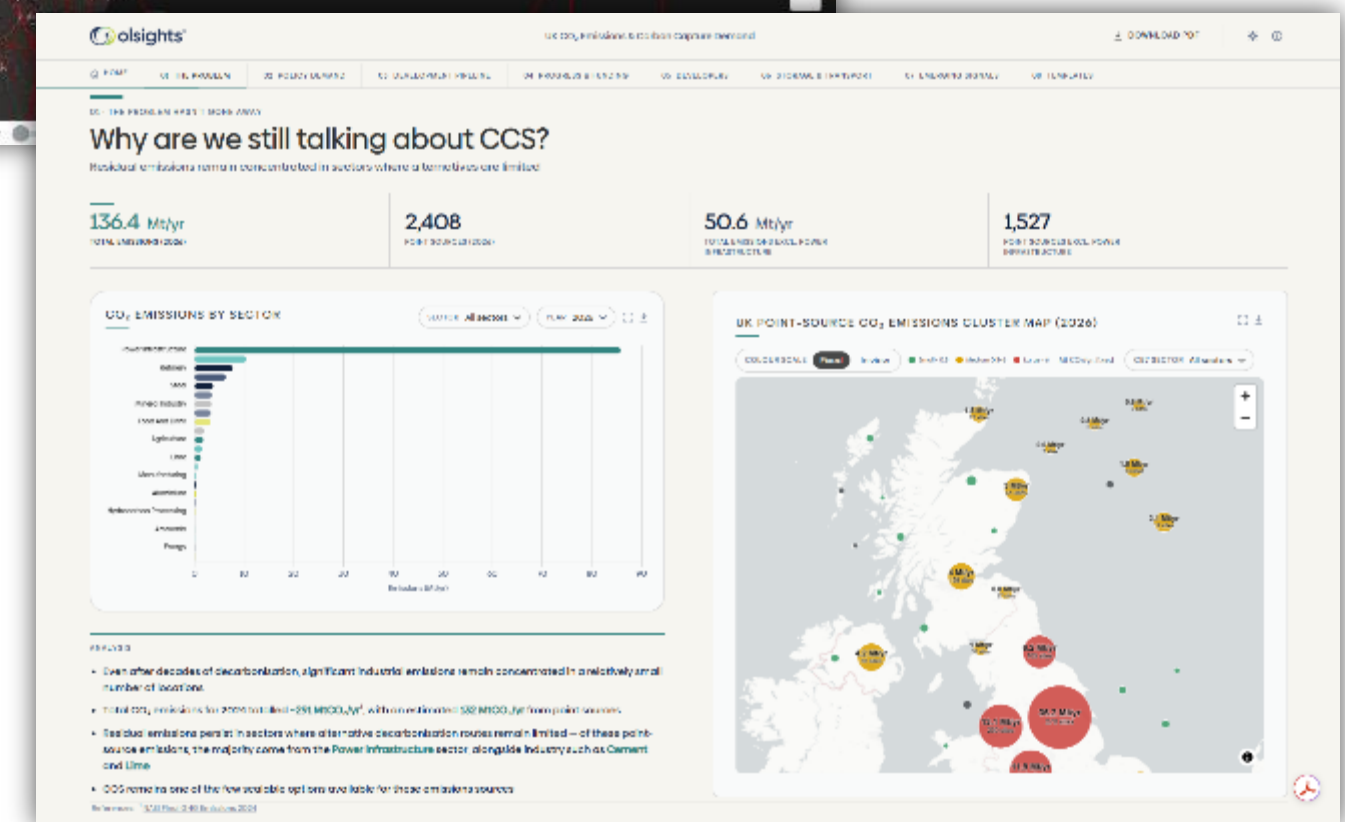
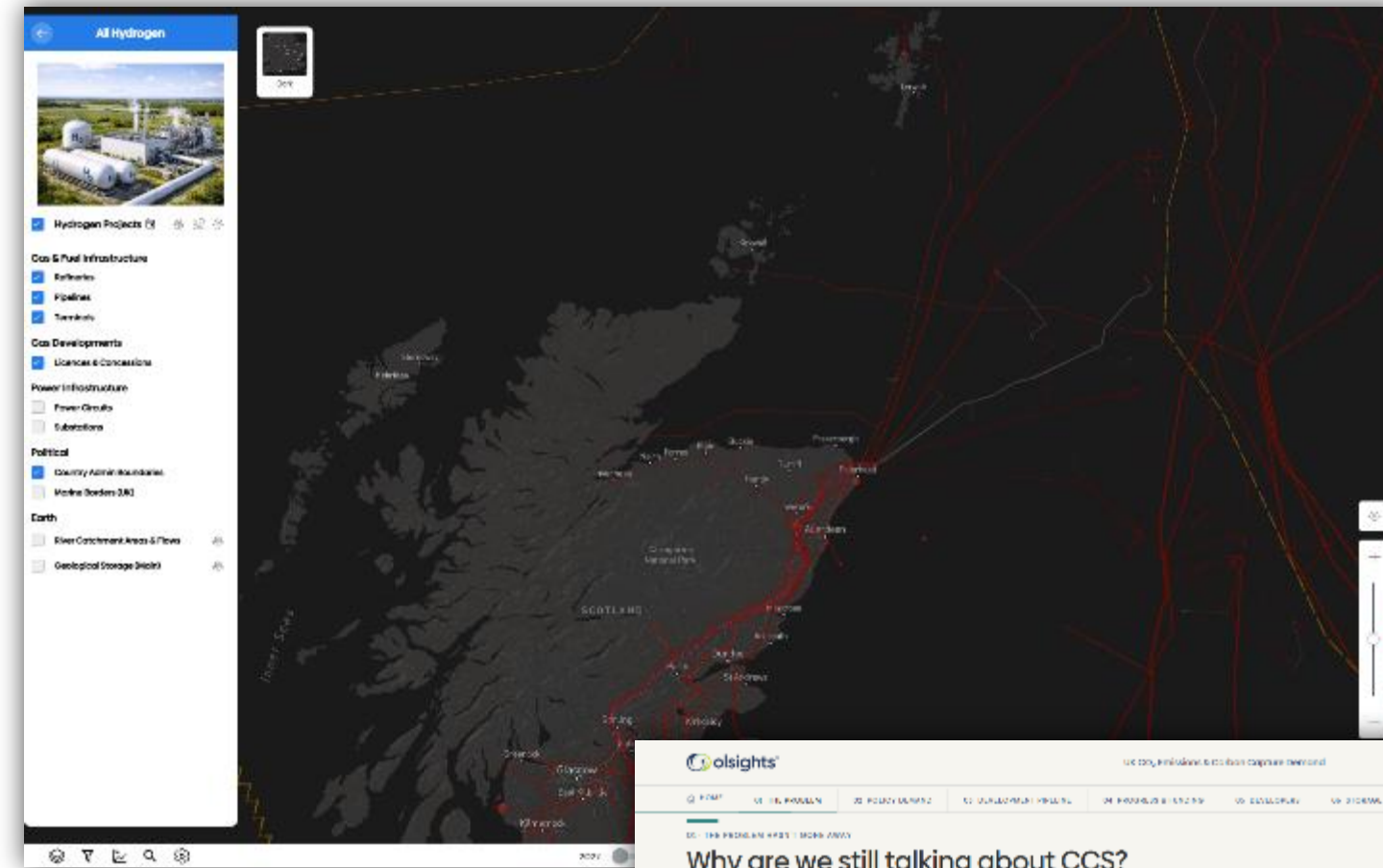
Plenty of policy support to generate future Scottish SAF?

# 8. How we help Businesses

## We can help with:

- Identify opportunity
- Prioritise investment
- Understand future markets
- Reduce uncertainty

Example interactive spatial intelligence - hydrogen [Olsights]



Example Interactive Data-driven Report - CCS [Olsights]

## 9. Request for Feedback

### **We're looking for honest Supply Chain feedback:**

- How do you currently identify future opportunities?
  - What information is hardest to find?
  - What decisions would better intelligence improve?
  - Would you be interested in exploring this further?
- Come and challenge our assumptions..



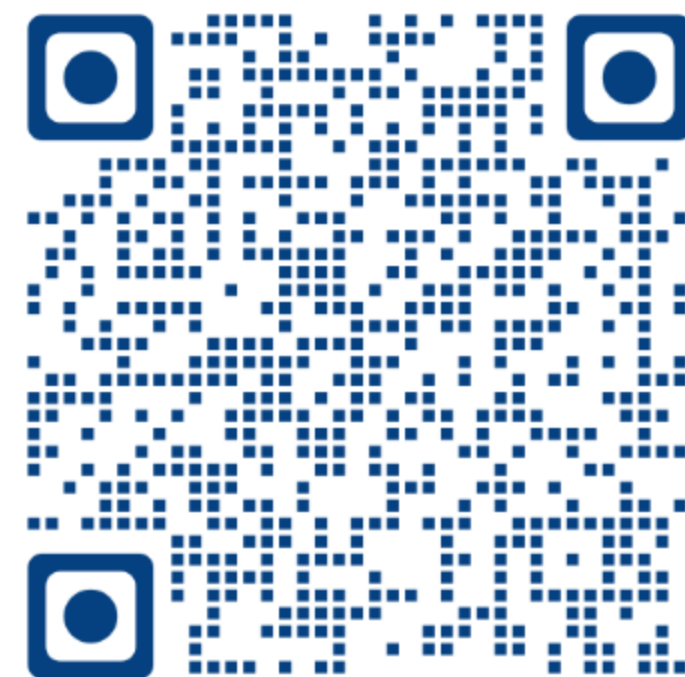
## Three Questions For Lunch:

1. **What opportunity** are you most excited about?
2. **What information** is hardest to find?
3. Could **better visibility** change your decisions?

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# Bonus – Link between generational grid build + football success?

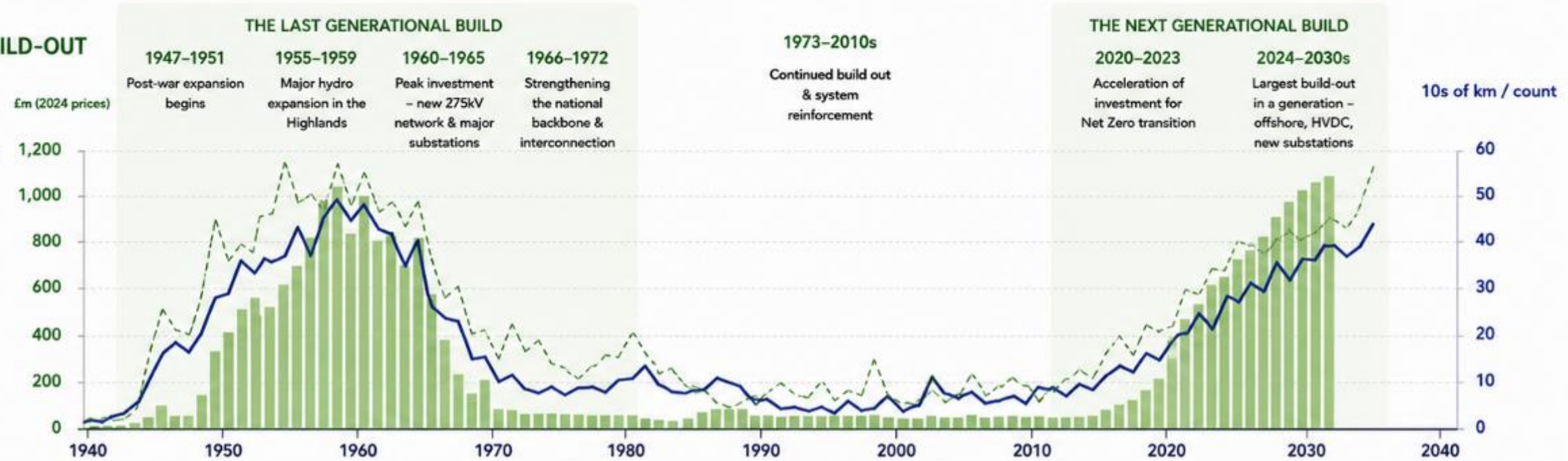
## BUILDING THE GRID. BUILDING SUCCESS.

Scotland's transmission investment and football achievements – a timeline of generational opportunity

### SCOTLAND'S TRANSMISSION BUILD-OUT

Investment in Scotland's transmission network

- Regulated Asset Value (£m, 2024 prices)
- New circuit added (10s of km, annual)
- - New substations (annual)



### SCOTTISH FOOTBALL SUCCESS

Key moments of success on the world stage

- ⚪ Scotland National Team
- ⚪ Celtic FC
- ⚪ Rangers FC



**LONG-TERM INVESTMENT. STRONG FOUNDATIONS. GENERATIONAL OPPORTUNITY.**

The last generational build helped power an era of football success.  
 The next generational build can power Scotland's energy future.

Sources: SSEN Transmission RIIO-T2 Data Tables, National Grid ESO, Ofgem, UEFA, FIFA, RSSSF